

	Montana Operations Manual <i>Standard</i>	Policy Number	X
		Effective Date	X
		Last Revised	X
Issuing Authority	State of Montana Chief Information Officer		
Information Technology Project Management			

I. Purpose

This Information Technology Project Management Standard (Standard) defines requirements for the management of Information Technology (IT) projects.

II. Scope

This Standard applies to all executive branch agencies and other service providers (e.g. independent contractors) who have access to, use, or manage IT. This Standard applies to IT projects funded through the Long Range IT Plan (LRITP) (2-17-512(1)(g), MCA), whose gross estimated value exceeds \$250,000, or as required by the State of Montana Chief Information Officer (CIO).

III. Statement of Standard

A. Project Management Standard

The American National Standards Institute/Project Management Institute 99/001/2008, "A Guide to the Project Management Body of Knowledge" (PMBok) is the project management framework.

B. Reporting on IT Projects

All project managers shall report to the State Information Technology Project Management Office, at the start of a project, monthly during the project, and the end of a project.

The CIO may set the manner of reporting, but the reports must contain the following information:

1. Project Baseline Report

The Project Baseline Report must be submitted no later than 60 days after the project management plan has been approved but before work has commenced. It must contain (except where noted as optional):

a. Project Management Process Report

- (a) Project Scope Statement
- (i) Scope Description

- (ii) Project Deliverables
 - (iii) User Acceptance Criteria
 - (b) Work Breakdown Structure
 - (c) Work Breakdown Dictionary (optional)
 - (d) Schedule Baseline
 - (e) Cost Performance Baseline
 - (i) Cost Estimate
 - (ii) Appropriated Budget
 - b. Related Management Process Report
 - (a) Requirements Management
 - (b) Quality Management
 - (c) Communications Management
 - (d) Risk/Issue Management
 - (e) Stakeholder Management (optional)
 - (f) Acceptance Management (optional)
 - (g) Organizational Change Management (optional)
 - c. Acquisition Process Report
 - (a) Procurement Management Plan
 - d. Information Risk Management Report
 - (a) Statement of Impact on the Overall Risk Posture of the Organization
2. Project Status Report
- The Project Status Report must be submitted at the close of business on the first Monday of each month. It must contain:
- a. Project Summary Report
 - (a) Project Sponsor
 - (b) Current Project Cost Estimate
 - (c) Money Expended to Date
 - (d) Balance of Obligated Funds
 - (e) Project Phase
 - (f) Project Health, where:
 - (i) Green signifies the project is on track and/or minimal variance from project management plan.
 - (ii) Yellow signifies moderate variance from project management plan.
 - (iii) Red signifies major variance from project management plan.
 - b. Project Baseline Variance Report
 - (a) Summary of changes from current and previous project baseline during report period
 - c. Scope Performance Variance
 - (a) Scope variance from last Report and from the Project Baseline Report
 - (b) Statement of forecasting method(s) used to derive the Variance(s)
 - (c) Summary of approved project changes
 - d. Schedule Performance Variance

- (a) Schedule variance from last report and from the Project Baseline Report
 - (b) Statement of forecasting method(s) used to derive the Variance(s)
 - (c) Summary of approved project changes
 - (d) Work completed during the period
 - (e) Work scheduled to be completed in the next period
 - e. Cost Performance Variance Report
 - (a) Cost variance from the last Report and from the Project Baseline Report
 - (b) Statement of forecasting method(s) used to derive the Variance(s)
 - (c) Cost incurred within this period and to-date accumulated costs.
 - f. Performance Variance Report
 - (a) Analysis of past performance
 - (b) Health of the project where:
 - (i) Green signifies the project is on track and/or minimal variance from project management plan.
 - (ii) Yellow signifies warning to stakeholders to consider corrective actions or monitor previously determined corrective actions and/or moderate variance from project management plan.
 - (iii) Red signifies problem to stakeholders where immediate corrective action(s) are required and/or major variance from project management plan.
3. Project Closure Report
 The Project Closure Report must be submitted at the close of business on the first Monday of each month. It must contain (except where noted as optional):
- a. Scope Performance Variance Report
 - (a) Scope variance from Project Baseline Report
 - (b) Summary of approved project changes
 - b. Schedule Performance Variance Report
 - (a) Schedule variance from the Project Baseline Report
 - c. Cost Performance Variance Report
 - (a) Cost variance from the Project Baseline Report
 - d. Performance Variance Report
 - (a) Analysis of past performance
 - (b) Lessons learned that were identified by the agency:
 - (i) Causes of Variance
 - (ii) Root causes of issues
 - (iii) Reasoning behind chosen corrective action(s)
 - (c) Lessons learned regarding overall Project Management and project team actions/responsibilities and impact on the project
 - (d) Maintenance and Operations Plans for the information system(s)
 - (e) Enhancement plans for the information systems
 - (f) Service/Product/Application Lifecycle

- (g) Outstanding Issues/Risks and associated management plans for the information system(s)
 - (h) High level summary of follow on projects with projected schedules if applicable.
- e. Quality Report
 - (a) Remaining defects/issues and plans to resolve
 - (b) Project Acceptance by the agency stakeholders
- f. Political Report
 - (a) Acceptability and appropriateness of project by agency stakeholders
 - (b) Legal issues identified during project and their resolution
 - (c) Agency stakeholder perceived and real needs met by project
- g. Related Management Process Performance Report
 - (a) Requirements Management
 - (b) Quality Management
 - (c) Communication Management
 - (d) Risk/Issue Management
 - (e) Stakeholder Management (Optional)
 - (f) Acceptance Management (Optional)
 - (g) Organizational Change Management (Optional)
- h. Acquisition Process Report
 - (a) Contractor Assessment Form
(<http://stisd.mt.gov/contract/cap.mcpx>) for contractors that were utilized by the project using the Master Contract Engagement Procurement process (CEP) for IT services
 - (b) Recommendations for improvement of the acquisition process (optional)
 - (c) Lessons learned related to the acquisition factors of the project
- i. Information Risk Management Report
Any changes to the initial Statement of Impact to the overall risk posture of the organization.

4. Post Implementation Review

Post-Implementation Review must be submitted between 3 to 9 months after the closure of the project on the form provided by the State IT PMO.

IV. Roles and Responsibilities

A. Project Manager

The Project Manager is identified in the Project Charter. The Project Manager submits reports to the State IT PMO

B. State IT PMO

The State IT PMO is the office designated by the CIO to receive reports from Project Managers and publish information on IT projects when directed.

V. Definitions

A. Baseline

An approved plan for a project, plus or minus approved changes. It is compared to actual performance to determine if performance is within acceptable variance thresholds.

B. Project Baseline Approval Report

A report containing information from the Project Management Plan and the project's baseline.

C. Variance

A quantifiable deviation, departure, or divergence away from a known baseline or expected value. For the purpose of this procedure, Variance shall be graphically depicted with a Δ (triangle) or delta symbol.

D. Variance Criteria

Criteria established for measurement of Variance.

Refer to the "Guide to the Project Management Body of Knowledge (PMBOK® Guide)-Fourth Edition" for additional project management definitions.

VI. Enforcement

The CIO is responsible for the Standard's implementation and enforcement. The CIO shall monitor compliance and make enforcement recommendations to the appropriate level of management given the particular circumstances.

VII. Changes and Exceptions

The [Establishing and Implementing Statewide Information Technology Policies and Standards](http://sitsd.mt.gov/policy/policies/default.mcp) governs procedure changes or exceptions. Submit requests for a review or change to this instrument by an Action Request form (at <http://sitsd.mt.gov/policy/policies/default.mcp>). Submit requests for exceptions by an Exception Request form (at <http://sitsd.mt.gov/policy/policies/default.mcp>). Changes to procedures shall be prioritized and acted upon based on impact and need.

VIII. Closing

Direct questions or comments about this instrument to the State of Montana Chief Information Officer at ITSD Service Desk (at <http://servicedesk.mt.gov/ess.do>), or: \

PO Box 200113
Helena, MT 59620-0113
(406) 444-2700
FAX: (406) 444-2701

IX. References

A. Legislation

1. [2-17-512\(1\)\(g\), MCA](#)
2. [2-17-512\(1\)\(s\), MCA](#)

B. Policies, Directives, Regulations, Rules, Procedures, Memoranda

1. [Establishing and Implementing Statewide Information Technology Policies and Standards](#)

C. Standards, Guidelines

1. Guide to the Project Management Body of Knowledge (PMBOK® Guide)- Fourth Edition

X. Administrative Use

Scheduled Review Date: [Click here to enter a date.](#)

Changes: [Click here to enter text.](#)